

## Integration Partner Integration Support & Transition Achievement Report (Deliverable 153.1.1a) December 2003

### **Executive Summary**

Integration Partner supports FSA's leadership and the actions required to drive the development of integration projects and initiatives. This report summarizes Integration Partner's activities for the month of December that support the development of integration projects and initiatives.

Major accomplishments for the month include those accomplishments that support FSA's Business Integration and Technology Group. This support has included the following:

- Development of enterprise sequencing plans that focus specifically on FSA's business and technical integration initiatives and critical dependent enterprise activities,
- Continued management of enterprise integration risks, and
- Development of artifacts and presentation content in support of GAO's review of FSA's system integration efforts.

Finally, representatives across all of the Integration Partner integration initiatives participated in FSA's Electronic Access Conference (EAC) in New Orleans.

Enterprise gaps that may have an effect on FSA's integration program are summarized on page 5. In summary, there has potentially been delayed progress to the integration program as a result of the delay of the Data Strategy II task order award. The Data Strategy task order period of performance concluded on November 17, 2003. The task order for follow-on efforts to Data Strategy (Data Strategy II) is still under review by FSA. This delay has an impact to the Integration Partner Data Strategy resources, and also delays the progress of target FSA Performance Plan completion dates. Integration Partner and FSA need to work together to ensure timely approval of the new task order.

### **Overall Value Delivered**

#### Integration Progress

The following synopsis outline progress towards major integration initiatives within the Integration Partner program, including Application & Delivery, Enterprise Data Strategy and Trading Partner Management.

#### **Application & Delivery**

- Common Origination & Disbursement (COD) Releases 3.0 and 3.1 (2004-2005 annual cycle) will continue to build upon the existing COD solution that provides FSA with a core, single integrated solution to manage aid originations and disbursements.
- Test efforts are underway for Release 3.0; implementation is currently scheduled for a March release. Release 3.1 is currently scheduled for a July 2004 implementation; functional and technical designs are currently under development.
- COD team members participated in FSA's EAC in New Orleans.

### **Enterprise Data Strategy**

- The Data Strategy task order (TO 123) concluded in November. Integration Partner is awaiting the award of a new task order, Data Strategy II, so that follow-on Data Strategy efforts can begin. As a result, there was no progress made during the month of December.
- Data Strategy team members participated in FSA's EAC in New Orleans.

### **Trading Partner Management (TPM)**

- This task order will seek to address any gaps or remaining aspects within the TPM framework that have yet to be identified, resulting in end-to-end business requirements for an overall TPM solution.
- The team worked with FSA to begin developing Financial Partners Oversight and Eligibility As-Is flows as they relate to the Trading Partner Management framework. The requirements for Non-Case Management Schools were also drafted.
- TPM Gap Analysis team members participated in FSA's EAC in New Orleans.

The Integration Partner Bi-Weekly Status Reports provide detailed project-level status, as well as a Program Scorecard that reflects project variances from the previous reporting month, and is focused on the Task Order, Scope, Schedule, Cost, Quality and Overall variances. Most projects are on schedule and have no significant issues, with the exception of the COD and Contract & Financial Management task orders which have reported minor schedule slippages. The reason for the Contract & Financial Management slippage was because the task order had not been signed at the time of the report. Refer to the attached December Bi-Weekly Status Reports, Final Bi-Weekly Status Report 12152003 v2.pdf.

### *Participation in FSA Business Integration & Technology Group (BITG)*

The Integration Partner provides business, technical and integration support to FSA's Business Integration and Technology Group. Integration Partner provides this group with the following:

- Vision analysis, facilitation and establishment,
- Coordination and alignment of the Integration Partner program with overall program vision,
- Agenda management and meeting coordination,
- Management of the enterprise sequencing plans, and
- Facilitation of major integration dependencies, risks and issues.

Accomplishments for the month of December have included participation in key integration discussions, continued management of integration risks and enterprise sequencing plans for FSA's various integration projects and initiatives and general BITG administration. Additionally, Integration Partner has provided support in preparation for GAO's review of FSA's system integration efforts. Support has included artifact identification and gathering, as well as assistance with the development of the kickoff presentation. The Integration Partner approach and workplan for the GAO related support were defined this month. Finally, Integration resources participated in FSA's EAC in New Orleans.

Key integration discussions and decisions resulting from the weekly BITG meetings for the month of December included:

- GovLoans/eLoans (*presented by FSA's Charlie Coleman*)
  - GovLoans is a primary component of eLoans, which is included in the President's Management Council Agenda of the 25 eGovernment initiatives.
  - The eLoans workstreams will include business-to-government lender reporting improvements, sharing default/lender data, electronic lender payments to agencies and the GovLoans Gateway.
  - GovLoans will be a sub-site of the Department of Labor's GovBenefits website, and will include content related to housing loans, student loans, small business loans, veteran's loans and farm loans.
  - The content of GovLoans will build on information currently being provided to GovBenefits by each agency.
  - The tentative release date for GovLoans is April 29, 2004.
  - Features of the GovLoans site will include program descriptions, a glossary, FAQs, general requirements loan wizard, keyword search and a lender locator.
  - DoED is leading the development of GovLoans in partnership with the DOL, HUD, SBA, USDA, VA and OMB.
  - The GovLoans team will work with FSA to gather and verify content on student loan program information.
  - The BITG raised questions around content management, such as overlapping content between FSA, the Department and eLoans/GovLoans. The BITG also suggested that users of GovLoans be directed to the Student Aid on the Web.
  
- Common Services for Borrowers – Post Award (*presented by FSA's Dan Hayward*)
  - The awarded CSB solution ties to the initial CSB vision. Components include: integration of system and data, optimization of portfolio management, realization of operational efficiencies, reduction of costs and improvements in customer service.
  - The following legacy systems will be replaced with the new integrated solution: DLSS, DLCS, DMCS, PIC and CDDTS.
  - The deal includes five base years with five one-year options.
  - The awarded proposal provided operational stability of major systems, low costs due to amortization of costs, performance based incentives and disincentives, superior technical approach and Department ownership of the software at the end of the contract.
  - A tiered pricing structure will be utilized to pay for repayment borrowers.
  - CSB will be transitioned and implemented in three different phases. Phase one will focus on front-office integration (January 1-January 31, 2004); Phase two will focus on back-office integration (March 2005); and Phase three will focus on the final integration and move to the VDC (November 2005).
  - The IT strategy was reviewed, to include strategies around data, data conversion, data archiving, system conversion, architecture, systems transition and the VDC. The CSB communications architecture will be based on FSA's current ITA, and the CSB solution

- will also use FSA's EAI Bus and middleware for both inter- and intra- system communications.
- The CSB solution aligns with current FSA integration initiatives, such as Data Strategy, RID, XML and SSIM.
  - A risk management summary was also provided, including steps being taken to ensure the success of the project given its high-risk nature.

Integration Partner will participate in the following scheduled FSA BIG discussions for the month of January:

- 1/06: Access Management Tools Analysis Overview
- 1/08: Impacts of the Oracle 11i Upgrade

The BIG discussions for the month of January will be limited, as the meeting time will be utilized for FSA resources to discuss market research activities.

Additionally, Integration Partner will continue to support FSA's BIG during GAO's Systems Integration review.

#### Enterprise Risk Management

FSA's BIG continues to identify integration risks among the key integration initiatives. Risks were reviewed and updated during the month of December. Integration risks will continue to be identified, monitored and escalated to Management Council as needed. Refer to the attached document, Risk Tracking 12112003 v12.xls, for the current risk tracking spreadsheet.

Additionally, Integration Partner project-level risks can be found in the Bi-Weekly Status Reports for the month of December. Refer to the attached document, Final Bi-Weekly Status Report 12152003 v2.pdf.

#### Enterprise Sequencing Plan

Sequencing plans for key integration initiatives must be managed at the program level. Integration Partner maintains the program schedule, the Integrated Master Schedule, which tracks Integration Partner task order start and end dates, major milestones and future projects. Refer to the attached document, Mod Integrated Master Schedule\_121503\_v5.pdf, for the current Integration Master Schedule.

Integration Partner also maintains FSA's Integrated FSA Sequencing Plan views, which help to inform planning of investment initiatives by providing a consolidated view of constraints and an integrated view of timelines and dependencies across major integration initiatives. During the month of December, Integration Partner and the BIG continued to develop a sequencing plan focused specifically on FSA's business and technical integration initiatives and critical dependent enterprise activities. Refer to the attached document, FSA BIG Sequencing Plan Integration DRAFT 12302003 v2.xls, for the current integration-focused sequencing plan.



### Enterprise Gaps

The following synopses summarize any enterprise gaps that may have an effect on FSA's integration program.

- The Data Strategy task order period of performance concluded on November 17, 2003. The task order for follow-on efforts to Data Strategy (Data Strategy II) is still under review by FSA. This delay has an impact to current Integration Partner Data Strategy resources, and also delays the progress of target FSA Performance Plan completion dates. Integration Partner and FSA need to work together to ensure timely approval of the new task order.

### Integration Efforts Planned for January 2004

The Integration Partner will focus on further developing the following integration areas: Application & Delivery, Data Strategy and Trading Partner Management.

#### **Application & Delivery**

- COD will continue to move forward with development activities for Releases 3.0 and 3.1.

#### **Enterprise Data Strategy**

- Upon award of the Data Strategy II task order, the Integration Partner teams will begin related planning efforts.

#### **Trading Partner Management**

- The Integration Partner team will continue to develop Financial Partners Oversight and Eligibility As-Is flows and the requirements for Non-Case Management Schools.

#### **Integration & Transition Support**

- The Integration Partner team will continue to support the efforts of FSA's BITG, to include management of integration risks and sequencing plans, coordination of weekly BITG meetings and assistance as needed with the GAO Systems Integration review.
- The Integration Partner team will participate in the January BITG meeting discussions.

The Integration Partner Bi-Weekly Status Reports provide detailed project-level status for the upcoming weeks. Refer to the attached December Bi-Weekly Status Reports, Final Bi-Weekly Status Report 12152003 v2.pdf.